



## US tax status declaration – individual

Use this form to certify whether you **are** or **are not** a United States (US) citizen for tax purposes.

**Important:** You may be treated as a US taxpayer if you don't provide this information.

This form is required for individuals who have been identified as potentially being a US taxpayer.

Please print in CAPITAL LETTERS and place a cross  in any applicable boxes.

### 1. Personal details

Please provide the plan/policy/member/account number for products you hold with AMP or any other reference number:

Surname

Full given name(s)

Date of birth

Residential address (PO Box is not acceptable)

Suburb

State

Postcode

Country

### 2. US tax status

Are you a US citizen or resident for tax purposes?

- No—go to section **3**
- Yes—please provide your US Taxpayer Identification Number (TIN) and go to section **4**:

### 3. Supporting evidence



If you're not a US citizen or resident for tax purposes, additional identification documentation is required to support this status (as you have been identified as having a US address, phone number, place of birth, citizenship or dealings with the US).

Select **one** category that applies to you:

- Born outside of the US—complete section **3.1**.
- Born in the US—complete section **3.2**.

### 3. Supporting evidence continued

#### 3.1 Born outside of the US

Please select and send us **one** of the following documents:

- A copy of a current Australian State or Territory Driver's Licence containing your photograph, or
- A copy of an Australian passport that is current or has expired within the preceding two years, or
- A copy of a citizenship certificate issued by a non US Government<sup>1</sup>, or
- A copy of a foreign government issued passport (or similar international travel document<sup>1</sup>) that contains your photograph and signature.

#### 3.2 Born in the US

Please send us the documents that you've selected in option **A** and **B** below:

##### Option A

**One** of these:

- A copy of an Australian passport that is current or has expired within the preceding two years, or
- A copy of a citizenship certificate issued by a non US Government<sup>1</sup>, or
- A copy of a foreign government issued passport (or similar international travel document<sup>1</sup>) that contains your photograph and signature.

##### Option B

**One** of these:

- A copy of your certificate of loss of nationality of the United States, or
- A reasonable explanation why you do not hold a certificate of loss of nationality, or
- A reasonable explanation as to why you did not obtain US citizenship at birth.

<sup>1</sup> Documents that are written in a language that is not English must be accompanied by an English translation prepared by an accredited translator.

### 3. Supporting evidence continued

#### 3.2 Born in the US continued

If you selected an option above that requires an explanation, please provide the written explanation here:

### 4. Declaration

This form must be signed by you (the individual) **or** your financial adviser.

By completing and signing this declaration, I certify that the information I have provided is true and correct.

I agree to notify AMP as soon as possible when my tax residency changes.

Name (Print in CAPITAL LETTERS)

Signature

X

Date

D	D	M	M	Y	Y	Y	Y
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### 4. Declaration continued

#### Financial adviser declaration

By completing and signing this declaration, I certify that the individual named in this form has (verbally or in writing) confirmed (to me) the truth of the information provided and I have no reason to doubt its reasonableness.

AFS Licensee name (Print in CAPITAL LETTERS)

AFSL number

Representative/Employee name

Contact phone number

Mobile number

Signature

X

Date

D	D	M	M	Y	Y	Y	Y
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### 5. Checklist

- Have you completed all relevant sections of this form?
- Have you provided a legible copy of the relevant documentation (and any required translation) selected in **supporting evidence** section 3?
- Have you signed and dated the form where indicated?

### Where to send this form

Email or mail this completed form to:

FTR@amp.com.au

**Within Australia** (no stamp required)

FTR Team  
Reply Paid 300  
PARRAMATTA NSW 2124

**Any questions?**  
1300 663 253

**From overseas**

FTR Team  
PO Box 300  
PARRAMATTA NSW 2124  
AUSTRALIA

**Any questions?**  
61 2 8048 8257

#### Office use only

Internal reference number